

# **CBAI's Community Bank Marketing Conference**

**May 10, 2017  
Erin's Pavilion, Springfield**

## **Reaching the New Digital Customer**

**Featuring Jim Marous  
of The Financial Brand**



**Digital Banking Trends  
Net Checking Growth  
Reaching Millennial Business Owners  
The Mobile-Banking Horizon  
Networking Roundtables  
Mini Exposition and More!**

# Introduction

The 2017 Community Bank Marketing Conference is designed to help you reach the new digital customer; market for net checking growth; capture a new generation of millennial business owners; find out what's next in mobile banking; and more. **This conference was developed by a committee of community-bank marketing professionals with the needs of their peers in mind.** Participants walk away with a wide variety of information from expert speakers on topics and return to the bank excited and ready to implement newly found techniques and knowledge!

**Again this year, two roundtable discussion sessions are on the agenda to allow participants to learn from each other.** Each roundtable is dedicated to a specific marketing topic. Attendees are able to pre-select which table discussion in which they would prefer to participate.

Roundtable topics include social media, hot products/technology, PR/special events, cross selling, mobile banking, and advertising/website compliance (including ADA).

**A mini-exposition featuring the latest products and services benefitting the community bank and its marketing efforts also highlights the day.**

## Who Should Attend?

The 2017 Community Bank Marketing Conference not only benefits **marketing professionals**, it is also geared toward **presidents, CEOs, officers**, and anyone who is involved in increasing profitability for your community bank.

# Conference Agenda

**8:30 – 9 a.m.**

Registration, Display Tables, and Continental Breakfast

**9 – 10:15 a.m.**

***Reaching the New Digital Customer***

**Jim Marous, Co-Publisher of The Financial Brand Owner & Publisher, Digital Banking Report**

The objective of this session is to present a roadmap for the upcoming year on reaching the new digital customer, including strategic priorities, focusing on the most important component for success ... data. It examines the challenges and opportunities of personalization and contextuality, leveraging consumer data for an improved experience (similar to Amazon, Uber and Apple). The session also shows what the expectations and experiences in finance will be with AR, VR, IoT and AI. Finally, participants learn “what do you do today.”



Marous

## Key Objectives

- Top 10 Retail Banking Trends and Strategic Priorities
- Data is the fuel that drives tomorrow's banks
- Personalization: More than a smiling face
- What's The Future
- Don't boil an ocean: Where to start

**Jim Marous** is the authority on retail banking, financial services innovation and consumer trends. His keynote presentations and workshops inspire audiences, change perspectives, and provide practical tools to maximize future opportunities. Named as one of the most influential people in banking and a Top-5 Fintech influencer, Marous is internationally recognized as a financial strategist, co-publisher of *The Financial Brand*, and owner and publisher of the *Digital Banking Report*. Marous advises on innovation, portfolio growth, customer experience, marketing strategies, channel distribution, payments and digital transformation. A sought-after speaker in the banking field, author and recognized authority on disruption in financial services, Marous has been featured by *CNBC*, *CNN*, *The Wall Street Journal*, *New York Times*, *The Financial Times*, *The Economist*, *The American Banker*, *Accenture* and *Forbes* and has spoken to audiences worldwide. Marous has also advised the White House on banking policy and is a regular contributor and guest host for the *Breaking Banks* radio show.

*“I am thrilled to hear that Jim Marous is speaking at the annual CBAI Marketing Conference. I am a huge fan of him and his work. Jim is one of the top resources in the nation on financial marketing trends, banking technology, product innovation and customer experience. He provides amazing analysis and insights through his articles on The Financial Brand, his Digital Banking Report, and his industry presentations. You won't want to miss him speak!”*  
– Lori Philo-Cook, founder of InnovoMarketing & CBAI Marketing Groups facilitator

# Conference Agenda (continued)

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10:15 – 10:30 a.m.  
Break and Display Tables

10:30 – 11 a.m.  
**Marketing Roundtable Session**

This roundtable discussion session encourages attendees to interact and learn from each other. Each roundtable is dedicated to a specific marketing topic. Attendees are able to pre-select which table discussion in which they would prefer to participate. Roundtable topics include social media, hot products/technology, PR/special events, cross selling, mobile banking, and advertising/website compliance (including ADA). *Please indicate on the registration form which table you prefer.*

*“Great speakers and relevant topics. This is the best marketing conference I have attended.”*

11 a.m. – 12 p.m.  
**Marketing for Net Checking Growth**  
**John Verre, President & CEO**  
**Leap Strategic Marketing, LLC, Waukesha, WI**

This session helps retail and marketing officers understand the national metrics of the community bank checking situation and provides the tools and processes necessary to build a checking acquisition program. Participants learn how to grow the profitability of consumer accounts.

- National metrics of community bank checking situation
- Best practices approach to building checking acquisition programs
- How to evaluate the success of those programs from expense, cross selling, and profitability
- Refining and applying experiences

**John Verre** is president and CEO of Leap Strategic Marketing, a marketing/communications agency that is dedicated to financial services. Formerly, Verre was vice president and marketing communications director for M&I Bank, a \$58.5 billion dollar bank headquartered in Milwaukee, WI. At M&I, he directed an in-house advertising agency of 42 people for five years. The bank operated more than 245 branches in eight states. During his tenure, the M&I agency won more than 35 national financial, advertising, and marketing awards. He was named employee of the year at M&I for his innovative approach to financial services marketing in 2010. In 2011, BMO Harris bought M&I and Verre launched Leap Strategic Marketing a few months after that acquisition. Prior to his positions at M&I and BMO Harris, Verre was managing partner and director of client services for HY Connect, a \$150 million advertising agency with offices in Chicago, Milwaukee, and Minneapolis. Verre has bachelor's and master's degree in advertising from the University of Illinois, Urbana.

12 – 1 p.m.  
**Networking Lunch/Exhibits**

*“The best conference yet! I have lots to take back to the bank! It was fun and informative!”*

1 – 2:15 p.m.  
**What's Next in Mobile Banking**  
**Kathleen Craig, HT Mobile Apps**

Your mobile-banking strategy can be a powerful way to differentiate your bank, attract new customers, and keep existing ones. Banks need to be open minded and willing to learn marketing and security lessons drawn from trail-blazing developing markets. Creating a mobile banking strategy is more than launching a new app or remote deposit. Does your bank have a solid plan for mobile?

**Kathleen Craig**, founder and president of HT Mobile Apps, has more than a decade of customer service experience. She began her career in the restaurant industry, working in leadership for Zingerman's Community of Businesses, a local food institution that was named *Inc. Magazine's* “Coolest Small Company in America.” During her time at Zingerman's, she traveled through the Midwest consulting on topics including customer service, supervising, visioning, and organizational change. She then served as vice president of eServices at a Michigan-based community bank, bringing her leadership, training and customer service talents to the \$900 million institution. Her entrepreneurial spirit drove countless organizational changes including a comprehensive customer feedback program, technology project implementations, social media strategy, and local charitable events.

Her experience at the bank led her to national speaking engagements on mobile banking technology. She was notably a Chairman's Club Recipient for internal service at United Bank & Trust and won several service awards during her time at Zingerman's. Her passion for technology, children, and financial education led her to the development of HT Mobile Apps and its first product, Banker Jr., launched in 2013.

*“This was one of the best seminars ever! Excellent speakers and very timely information that we needed. It was a wake up call. Thank you so much!”*

# Conference Agenda

2:15 - 2:45 p.m.

## Second Marketing Roundtable Session

This roundtable discussion session encourages attendees to interact and learn from each other. Each roundtable is dedicated to a specific marketing topic. Attendees are able to pre-select which table discussion in which they would prefer to participate. Roundtable topics include social media, hot products/technology, PR/special events, cross selling, mobile banking, and advertising/website compliance (including ADA). *Please indicate on the registration form which table you prefer.*

*“This is a very informative and interactive conference! Well worth one’s time!”*

2:45 – 3 p.m.

Exhibits/Break

3 – 4 p.m.

## Reaching Millennials: How to Capture a New Generation of Business Owner

**Shawn Dillon, General Manager**

**Berin Lacevic, Director of Sales**

**Fitech Payments, Fort Worth, TX**

This session educates marketing officers, loan officers, and presidents/CEOs on how to engage and secure millennial business owners through emerging payments technology, reporting analytics, and promoting and branding being local.

**Shawn Dillon** has been in electronic payments for 11 years with all of his experience related to programs built for community banks. As the General Manager, Shawn leads Fitech in our strategic efforts to support community bank associations and partners to grow electronic payment programs for the communities they serve.



Dillon



Lacevic

**Berin Lacevic** joined Fitech Payments in 2017 as director of sales. Lacevic works with community banks in Illinois to evaluate their current merchant services program and develops strategies to increase their revenue and drive portfolio growth. With more than nine years of experience in financial services, his past roles include vice president of sales at BankOnIt and as a sales representative for Zimmer

Orthopedics, representing their products and services for major hospitals within Oklahoma City. Lacevic has a bachelor’s degree in history from Purdue University, West Lafayette, IN.

4 p.m.

Prizes and Adjournment

# Registration Fees

Fees include hand-out materials, refreshment breaks, and lunch. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

## Cancellation Policy

Registrants cancelling two days prior to each seminar receive 100% refund; one day prior, 50%; the day of the seminar, no refund. **All cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all “no shows.”**

## CBAI MEMBER

One person.....	\$265
Two or more from same banking institution.....	\$245 each

## \*\*PROSPECTIVE-MEMBER

One person.....	\$465
Two or more from same banking institution.....	\$445 each

*CDD members receive a 10% discount.*

*\*\*Only financial institutions/firms eligible for CBAI membership.*

# Registration Form

COMMUNITY BANK MARKETING CONFERENCE  
MAY 10, 2017 – ERIN'S PAVILION, SPRINGFIELD

**Please Print**

Name of Bank \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Tel. No. \_\_\_\_\_

Name/Title \_\_\_\_\_

E-Mail \_\_\_\_\_  
(E-mail address required for registration)

Preferred Roundtable Topics **(Please circle two topics in the list below).**

Social Media, Hot Products/Tech, PR/Special Events, Cross-Selling, Mobile Banking, Compliance

Name/Title \_\_\_\_\_

E-Mail \_\_\_\_\_  
(E-mail address required for registration)

Preferred Roundtable Topics **(Please circle two topics in the list below).**

Social Media, Hot Products/Tech, PR/Special Events, Cross-Selling, Mobile Banking, Compliance

\_\_\_\_ I have special needs, please contact me before the seminar.

**Please select your payment method.**

\_\_\_\_ Check Enclosed                      \_\_\_\_ Check in Mail

\_\_\_\_ Pay at Door                              \_\_\_\_ Credit Card\*

**\*If you are paying by credit card, please fill out the following information.  
(Visa & MasterCard accepted).**

Name as It Reads on Card \_\_\_\_\_

Company Name on Card \_\_\_\_\_

Billing Address of Card \_\_\_\_\_

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Three-Digit Security Code: \_\_\_\_\_



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[www.cbai.com](http://www.cbai.com)



Mail it in:  
CBAI Education Department  
901 Community Drive  
Springfield, IL 62703-5184



Fax it in:  
(217) 585-8738



Call it in:  
(800) 736-2224 (Illinois only)  
(217) 529-2265

## Date and Location

May 10, 2017

Erin's Pavilion  
4965 S 2nd St.,  
Springfield, IL 62703  
(217) 753-0702

## Accommodations

A block of rooms has been reserved at the Baymont Hotel, 5871 South Sixth Street, Springfield. To obtain accommodations, call 217/529-6655. Please indicate you are a CBAI member to obtain the special rate of \$63 plus tax for singles or doubles.

## For More Information

Tracy McQuinn, Senior Vice President  
Valerie Johnston, Vice President  
Melinda McClelland, Vice President  
Rebecca Ridgeway,  
Administrative Assistant  
Jennifer Nika,  
Administrative Assistant  
Department of Education  
& Special Events  
800/736-2224 217/529-2265  
Fax: 217/585-8738  
Terry Griffin,  
Vice President Chicago Area  
708/714-3333

## Marketing Subcommittee Members

Mindy Combs, Chairperson, First Southern Bank, Marion  
Tracy Bedeker, First Federal Savings Bank, Ottawa  
Danielle Honn  
Petefish, Skiles & Company, Virginia  
Dena McDonald  
First Farmers State Bank, Bloomington  
Kim McKee  
North Central Bank, Ladd  
Ann Scholtes  
Bank of Pontiac  
Shelley Singleton  
CNB Bank & Trust, N.A., Carlinville  
Angela Truluck  
First National Bank of Steeleville

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